

# FIDUCIARY BOARD

## Meeting Agenda – Thursday, July 13, 2017

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 10:30 A.M. Conference Room 109

General Inquiries Call: 602-452-3378 (Certification and Licensing Division Line)

Members of the Public May Attend Meeting in Person

For any item listed on the agenda, the Board may vote to go into Executive Session for advice of counsel and/or to discuss records and information exempt by law or rule from public inspection, pursuant to the Arizona Code of Judicial Administration, Code Section 1-202(C).

**CALL TO ORDER .....***Deborah Primock, Chair*

**1) REVIEW AND APPROVAL OF MINUTES.....***Deborah Primock, Chair*

*1-A: Review, discussion and possible action regarding the regular session minutes of the meeting held on May 11, 2017.*

**2) PENDING COMPLAINTS.....***Division Staff*

*2-A: Review, discussion and possible action regarding the Division Director dismissal of complaint numbers 17-0003/17-0004.*

*2-B: Review, discussion and possible action regarding complaint number 16-0002, involving licensee, Professional Community Services.*

*2-C: Review, discussion and possible action regarding complaint numbers 16-0016 and 16-0017, involving licensee, Audrey Hanks and Professional Community Services.*

**3) INITIAL LICENSURE AND ELIGIBILITY.....***Division Staff*

*3-A: Review, discussion and possible action regarding the following applications for initial individual and business licensure:*

- 1. Elizabeth Morales*
- 2. San Pedro Fiduciary Services, LLC (Designated Principal, Paul Melo)*
- 3. Schraner Fiduciary Services, LLC (Designated Principal, Vonda Schraner)*
- 4. Misty Weigle*
- 5. Kathryn A. Blair*
- 6. Ramon Franco*
- 7. Edgar Garcia*
- 8. Janet Wells*

3-B: *Review, discussion and possible action regarding the denial of application for Dora Lydia Perego.*

**4) RENEWAL OF LICENSURE APPLICATIONS..... *Division Staff***

4-A: *Review, discussion and possible action regarding the following applications for renewal of individual and business entity licensure:*

1. D.M. Benjamin CPA, P.C. (Designated Principal, Donna Benjamin)
2. Entrust Fiduciary Services, Inc. (Lisa Price)
3. Lisa Price
4. James Otis
5. Robert Fleming
6. Paul Melo

**5) LICENSURE AND ELIGIBILITY.....*Division Staff***

5-A: *Review, discussion, and possible action regarding the voluntary surrender of licensure received from James Clark, License Number 20060.*

**6) ADMINISTRATIVE ISSUES ..... *Division Staff***

6-A: *Update on subcommittee to review possible Code changes involving guidelines concerning bankruptcies and other financial disclosure issues.*

**CALL TO THE PUBLIC ..... *Deborah Primock, Chair***

**ADJOURN ..... *Deborah Primock, Chair***